Workforce Administration

PHCMWFAL270:
PayPath Transactions – Part I
Introductions

Instructor

- Name
- UC role
- UCPATH role
- Years at UC
- Functional experience

Attendees

- Name
- University role
- Years at UC
- Expectations for this training
Training Logistics

Safety and Housekeeping
- Emergency evacuation procedures
- Restrooms
- Course duration: 4 hours
- Breaks

Classroom Etiquette
- Please turn off cell phones
- No email or web surfing
- Return from breaks on time
- Please use trash receptacles in the room
Parking Lot

- Capture any questions or concerns that cannot be addressed during class
- Provide follow up to all attendees of this class
1: PayPath Transactions Overview
2: Position Changes
3: Job Data Changes
Course Objectives

By the end of this course, you should be able to:

- Describe the PayPath Transaction system process.
- Describe the **PayPath Actions** entry pages.
- Describe the PayPath transaction action and reason codes.
- Initiate position change PayPath transactions.
- Initiate job data change PayPath transactions.
PayPath Transactions Overview

Module 1
The module learning objectives are:

- Identify the transactions performed using **PayPath Actions**.
- Describe the PayPath Transaction system process.
- Identify the PayPath transaction action and reason codes.
- Describe the **PayPath Actions** entry pages.
PayPath Actions – Overview

- PayPath Actions is a custom component designed to streamline updates to employee data in UCPath.

- The PayPath Actions component provides intuitive, compliant functionality that is designed to meet UC's academic and staff requirements. This component offers a one-stop-shop for processing various types of transactions and the flexibility to submit multiple actions in a single transaction.

- PayPath integrates changes to positions, jobs and additional pay, providing a tight integration between HR actions and funding requirements.
PayPath Actions – Components

There are two PayPath Actions components, one for academic and one for staff. The appropriate component displays based on the type of employee selected.

Examples of the differences between Academic and Staff components:

Some fields display values as applicable for staff or academic. For example: position and job data Action/Action Reason fields and valid Comp Rate Codes.

The Employee Class field is display-only for academic employees (derived from Job Code), versus editable for staff employees.

Job Data page, under UC Job Data section, different fields are visible as relevant to staff or academic. For example, staff employees have fields related to Probation and Probation Date, while academic employees have dates such as Post Docs Anniversary Date and Academic Duration of Appt.
The following types of transactions are processed for staff and academic employees using PayPath Actions.

- **Position Data Changes**
- **Job Data Changes**
- **Additional Pay**

- Position changes can be made only for positions that have an active incumbent.
  - New, vacant or multi-headcount positions must be created/updated using a **Position Control Request**.

- PayPath Actions is not used to hire, terminate, transfer or place employees on a leave of absence.
Examples of changes requested through **PayPath Actions**:  
- Academic Merit, Promotion or Change in Series  
- Position and/or Job Data FTE Changes  
- Salary Only Changes / Pay Rate Changes  
- Summer Compensation  
- Change in Status from Without Salary (WOS) to Paid or Paid to WOS  
- Short Work Break / Return from Short Work Break  
- Abeyance / Return from Abeyance  
- Changes to existing concurrent appointments  
- Recurring Additional Pay Payments  
- Retro Academic Merits, Promotions, Series Changes  
- Phased Retirement or Employee Reduction In Time (ERIT)
PayPath Transaction – System Process

PayPath Initiator
Navigate to PayPath Actions component

PayPath Initiator
Enter and Submit PayPath Transaction

PayPath Approver
Review / Approve PayPath Transaction

All
View Employee Data

AWE
All **PayPath Actions** transactions are routed for approval using the Approval Workflow Engine (AWE).

The AWE approval routing for a **PayPath Actions** transaction is based on:

- Security role tied to the Initiator (for example: Central vs. Department).
- Approval routing configuration by Location (Business Unit). For example, number of approval levels required.

AWE security role assignment and approval routing configuration is determined by each Location’s business process.
Introduction to PayPath Actions

Navigation: PeopleSoft Menu > UC Customizations > UC Extensions > PayPath Actions

Enter search criteria to locate the employee. In this example, a search was performed on the Last Name Allen. If only one employee matches the search criteria entered, the PayPath Actions component opens and displays the employee. If multiple employees match the search criteria entered, those employees display in the Search Results.
The **PayPath Actions** component is comprised of three pages: **Position Data**, **Job Data** and **Additional Pay Data**. Navigate to the appropriate page to enter the related update.
Use the **Position Data** page to enter position changes. The **Position Data** page provides two areas: **Existing Values** and **New Values to update**. This allows you to compare the existing position information while you enter the updated information.
PayPath Actions – Job Data Page

Use the **Job Data** page for various job data changes. The fields and values available on the **Job Data** page change depending on whether the employee selected from the search is an academic or staff employee.

Use the **Job Data Comments** to record details about the position and/or job changes that are entered. This note is stored directly in the employee’s **Job Data** for reference.
Use the top portion of the **Additional Pay Data** page to enter new additional pay information for an employee. If the employee has current additional pay set up, it displays on the right.

The bottom portion of the page applies to updates entered on **Position Data**, **Job Data** and **Additional Pay Data**.

Use the bottom portion of this page to:
- Upload or view supporting documents
- Enter comments to the Approver
- View the Transaction ID, Workflow Status and Request Status

The buttons allow you to save the transaction for later processing, submit the transaction for approval or cancel the transaction.
Retroactive Changes

- Changes can be entered retroactively for **Position Data** and **Job Data**.

- After the change is approved, it is saved to UCPath and the update is applied to the appropriate component in the appropriate row according to the **Effective Date**.

- For position and job updates, all rows of data after the retro change are also updated.

- The **PayPath Actions** pages display the latest effective dated row. Keep in mind that this could be a future dated row.
  - To view all rows of employee data, access the **Workforce Job Summary** page directly from the PayPath Actions **Job Data** page.
Action and Action/Reason codes further define the purpose of position change and job data change transactions.

You must specify the appropriate Action and Action/Reason codes when a PayPath transaction is initiated.

For Position Data there is only one Action: POS.
PayPath Transactions – Action Codes, Reason Codes and Descriptions

- This is your opportunity to review the job aid.
  - **Academic**: Open the UCPath Help site and refer to the *PayPath Transactions – Action Codes, Reason Codes and Descriptions (Academic)* topic.
  - **Staff**: Open the UCPath Help site and refer to the *PayPath Transactions – Action Codes, Reason Codes and Descriptions (Staff)* topic.

- Ask your instructor for assistance.
PayPath – Important Notes

- After a PayPath transaction is submitted for approval (Pending status), you cannot enter another PayPath transaction for that employee until the transaction has been processed by all Approvers.

- PayPath is accessed by employee record; therefore, if an employee has more than one job, each record has to be updated separately.

- PayPath allows historic, current or future updates for Position Data and Job Data.
Having completed this module, you should be able to:

- Identify the transactions performed using **PayPath Actions**.
- Describe the PayPath Transaction system process.
- Identify the PayPath transaction action and reason codes.
- Describe the **PayPath Actions** entry pages.
Module Review

Introduction

- You now have the opportunity to assess your knowledge of the information presented in this module.
- The questions and answers presented in this review help you to determine whether you remember and understand the important points.
Check Your Understanding

Ready to join?

Join at kahoot.it and enter the game PIN

88 Players

Kahoot!

Start
Position Changes

Module 2
The module learning objectives are:

- Describe the Position Change system process.
- Initiate position change PayPath transactions.
Position Changes – Overview

Position changes can be initiated for filled positions where only one employee is assigned to the position.

- The **PayPath Actions** search page restricts you from accessing a position that is vacant. The system displays an error message: “*No matching values. You have entered a position number that is vacant.*”

- The **Position Data** page appears in display-only mode if the employee selected is in a multi-headcount position, therefore restricting any position updates.
Position Changes

When a position change is entered, a new row with the same effective date is automatically inserted in the **Job Data** page and displays the updated position information.

- All **Job Data** fields that are controlled by **Position Data** appear as display-only.
- If needed, you can add additional **Job Data** rows (with the same effective date) to add job-related updates.

For example:

- **Position Data** change: Employee promoted to a new position.
- **Job Data** change: Employee receives a pay rate increase.
Position Change – System Process

- Role: PayPath Initiator

- Navigate to PayPath Actions
- Review employee information
- Enter position update
- Save and submit
Position Change – Action Reason Codes

- **Action** and **Action/Reason** codes further define the purpose of position change transactions.
- For position changes, the **Action** is always the same, **POS**. You need to complete only the **Position Change Reason**.
PayPath Transactions – Action Codes, Reason Codes and Descriptions

- This is your opportunity to review the job aid.
  - **Academic**: Open the UCPath Help site and refer to the *PayPath Transactions – Action Codes, Reason Codes and Descriptions (Academic)* topic.
  - **Staff**: Open the UCPath Help site and refer to the *PayPath Transactions – Action Codes, Reason Codes and Descriptions (Staff)* topic.

- Ask your instructor for assistance.
Use the Position Data page to enter position changes. You must enter the **Effective Date** and the **Position Change Reason** fields before entering the update.

Position information updated on this page also updates the **Job Data** page.

Click the **Position Data** link to access the position information component to view details for the position. For example, you can see if the position has multiple incumbents.

- Enter the **Effective Date** for the position update.
- Enter the **Position Change Reason** for the position update.
Instructor Demo

Initiate Position Change PayPath Transaction (Staff/Acad Dept Transfer)

- Watch as your instructor demonstrates how to initiate a position change PayPath transaction for a department transfer in UCPath.
- Follow along using the UPK topic.
  - Open the UCPath Help site and refer to the Initiate Position Change PayPath Transaction (Staff/Acad Dept Transfer) topic.
- Launch the Print It version of the topic.
- At the end of the demonstration, you will have the opportunity to practice this task.
Exercise

Initiate Position Change PayPath Transaction (Staff/Acad Dept Transfer)

- This is your opportunity to practice this task on your own.
  - Open the UCPath Help site and refer to the *Initiate Position Change PayPath Transaction (Staff/Acad Dept Transfer)* topic.

- Launch the **Try It** version of the topic.

- Ask your instructor for assistance.
Instructor Demo

Initiate Position Change PayPath Transaction (Promotion)

- Watch as your instructor demonstrates how to initiate a position change PayPath transaction for a promotion in UCPath.

- Follow along using the UPK topic.
  - **Academic**: Open the UCPath Help site and refer to the *Initiate Position Change PayPath Transaction (Acad Promotion)* topic.
  - **Staff**: Open the UCPath Help site and refer to the *Initiate Position Change PayPath Transaction (Staff Promotion)* topic.

- Launch the **Print It** version of the topic.

- At the end of the demonstration, you will have the opportunity to practice this task.
Exercise

Initiate Position Change PayPath Transaction (Promotion)

- This is your opportunity to practice this task on your own.
  - **Academic**: Open the UCPPath Help site and refer to the *Initiate Position Change PayPath Transaction (Acad Promotion)* topic.
  - **Staff**: Open the UCPPath Help site and refer to the *Initiate Position Change PayPath Transaction (Staff Promotion)* topic.
- Launch the **Try It** version of the topic.
- Ask your instructor for assistance.
Initiate Position Change PayPath Transaction (FTE Change)

- Watch as your instructor demonstrates how to initiate a position change PayPath transaction for an FTE change in UCPath.

- Follow along using the UPK topic.
  - **Academic**: Open the UCPath Help site and refer to the *Initiate Position Change PayPath Transaction (Acad FTE Change)* topic.
  - **Staff**: Open the UCPath Help site and refer to the *Initiate Position Change PayPath Transaction (Staff FTE Change)* topic.

- Launch the **Print It** version of the topic.

- At the end of the demonstration, you will have the opportunity to practice this task.
Exercise

Initiate Position Change PayPath Transaction (FTE Change)

- This is your opportunity to practice this task on your own.
  - **Academic**: Open the UCPath Help site and refer to the *Initiate Position Change PayPath Transaction (Acad FTE Change)* topic.
  - **Staff**: Open the UCPath Help site and refer to the *Initiate Position Change PayPath Transaction (Staff FTE Change)* topic.

- Launch the **Try It** version of the topic.
- Ask your instructor for assistance.
Having completed this module, you should be able to:

- Describe the Position Change system process.
- Initiate position change PayPath transactions.
Module Review

Introduction

- You now have the opportunity to assess your knowledge of the information presented in this module.
- The questions and answers presented in this review help you to determine whether you remember and understand the important points.
Check Your Understanding

Ready to join?

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Start
Job Data Changes

Module 3
The module learning objectives are:

- Describe the Job Data Change system process.
- Initiate a multi-row job data change PayPath transaction.
- Initiate a pay rate change PayPath transaction.
- Initiate a job earnings distribution PayPath transactions.
- Initiate a short work break PayPath transactions.
The **Job Data** page is used for many types of job-related updates, which can be made independent of a position change.

- However, if a position change is made, PayPath automatically updates the **Job Data** page to display the new position information.

- Some of the **Job Data** fields and values display differently for academic employees than they do for staff employees.
This is an example of the staff version of the Job Data page. The staff and academic versions are very similar; however, each version includes some fields and data that is relevant to either academic or staff employees. For example, for staff:

- The data values available in the Action and Action Reason fields are specific to staff.
- The Employee Class field can be edited.
- The fields in the UC Job Data section are specific to staff.
The academic version of the Job Data page is similar to the staff version, but there are some differences.

For example, for academics:

- The data values available in the Action and Action Reason fields are specific to academics.
- The Employee Class defaults and cannot be edited.
- The functionality of Pay Components and Earnings Distribution supports academic pay calculations.
- The fields in the UC Job Data section are specific to academics.
Multiple Job Data Changes

Guidelines for entering multiple rows of Job Data in a single transaction:

- Must be the same Effective Date.
- Enter the rows in sequential order, or the order in which they occur.
  - **Seq. 0** is the first update, then add a row.
  - **Seq. 1** is the next update, then add a row.
  - **Seq. 2** is the next update, and so forth.
- The sequence number is automatically populated when you add a row in PayPath Actions.

<table>
<thead>
<tr>
<th>Action</th>
<th>Effective Date</th>
<th>Effective Seq.</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pay Rate Change / Equity</td>
<td>3/1/2016</td>
<td>2</td>
<td>Third row added by user.</td>
</tr>
<tr>
<td>Pay Rate Change / Promotion</td>
<td>3/1/2016</td>
<td>1</td>
<td>Second row added by user.</td>
</tr>
<tr>
<td>Position Promotion</td>
<td>3/1/2016</td>
<td>0</td>
<td>Position Data change automatically inserts the first row in Job Data.</td>
</tr>
</tbody>
</table>
Action and Action Reason codes further define the purpose of job data change transactions.

The Action and the Action Reason fields are required.

The values available in the Action Reason field are dependent on the selection made in the Action field.
This is your opportunity to review the job aid.

- **Academic**: Open the UCPath Help site and refer to the *PayPath Transactions – Action Codes, Reason Codes and Descriptions (Academic)* topic.

- **Staff**: Open the UCPath Help site and refer to the *PayPath Transactions – Action Codes, Reason Codes and Descriptions (Staff)* topic.

- Ask your instructor for assistance.
Job Data Change – System Process

- Role: PayPath Initiator

- Navigate to PayPath Actions
- Review employee information
- Enter job data update
- Save and submit
Use the Job Data page to enter updates to job-related data such as pay, earnings distribution and short work break. You must enter the Effective Date and the Action and Action Reason fields before entering an update.

Job Data Comments are copied and stored in the Job Data component.
There are many types of Job Data changes, most of which fall into the first three categories.

- Data
- Pay Rate
- Job Earnings Distribution (JED)
- Short Work Break
Examples of data changes requested through PayPath include:

- Extension of Appointment End Date
- Extension of Location Use End Date
- Academic Reappointment
- Change from Limited to Career Status and Change of Employee Class (Staff Only)
- Update to Probation Code and/or Probation Date
- End Job Automatically Check Box Updates
Initiate Multi-Row Job Data Change PayPath Transaction

- Watch as your instructor demonstrates how to initiate multiple job data changes in a single PayPath transaction in UCPath.

- Follow along using the UPK topic.
  - Open the UCPath Help site and refer to the *Initiate Multi-Row Job Data Change PayPath Transaction (Staff/Acad)* topic.

- Launch the **Print It** version of the topic.

- At the end of the demonstration, you will have the opportunity to practice this task.
Exercise

Initiate Multi-Row Job Data Change PayPath Transaction

- This is your opportunity to practice this task on your own.
  - Open the UCPath Help site and refer to the *Initiate Multi-Row Job Data Change PayPath Transaction (Staff/Acad)* topic.
- Launch the **Try It** version of the topic.
- Ask your instructor for assistance.
Examples of pay changes requested through PayPath include:

- Change to rate of pay for staff or academic
  - Merit
  - Equity increases
  - Changes to negotiated salaries
  - Adjustments to off-scale salary amounts
  - Step increase progression

- Pay components (for example, X, X’ or Annual Salary) automatically populate based on selection of a salary step.
Initiate Pay Rate Change PayPath Transaction

- Watch as your instructor demonstrates how to initiate a pay rate change PayPath transaction in UCPath.

- Follow along using the UPK topic.
  - **Academic**: Open the UCPath Help site and refer to the *Initiate Pay Rate Change PayPath Transaction (Acad)* topic.
  - **Staff**: Open the UCPath Help site and refer to the *Initiate Pay Rate Change PayPath Transaction (Staff)* topic.

- Launch the **Print It** version of the topic.

- At the end of the demonstration, you will have the opportunity to practice this task.
Exercise

Initiate Pay Rate Change PayPath Transaction

- This is your opportunity to practice this task on your own.
  - **Academic**: Open the UCPath Help site and refer to the *Initiate Pay Rate Change PayPath Transaction (Acad)* topic.
  - **Staff**: Open the UCPath Help site and refer to the *Initiate Pay Rate Change PayPath Transaction (Staff)* topic.

- Launch the **Try It** version of the topic.
- Ask your instructor for assistance.
The Job Earnings Distribution (JED) is primarily used to distribute earnings by earn codes either by percentage or by amount, and is important for exempt employees as it controls how much they are paid when an adjustment to their FTE is not applicable.

Non-Exempt employees’ pay is generated based on their hours submitted in Time and Attendance.

Examples of JED changes requested through PayPath include:

- Employee Reduction in Time (ERIT)
- Phased Retirement Program
- HSCP-related automated JED by Earn Code
- NSTP-Negotiated Salary Trial Program

Change Type – Job Earnings Distribution
Initiate Job Earnings Distribution PayPath Transaction

- Watch as your instructor demonstrates how to initiate a job earnings distribution PayPath transaction in UCPath.
- Follow along using the UPK topic.
  - **Academic**: Open the UCPath Help site and refer to the *Initiate Job Earnings Distribution PayPath Transaction (Acad)* topic.
  - **Staff**: Open the UCPath Help site and refer to the *Initiate Job Earnings Distribution PayPath Transaction (Staff)* topic.
- Launch the **Print It** version of the topic.
- At the end of the demonstration, you will have the opportunity to practice this task.
Exercise

Initiate Job Earnings Distribution PayPath Transaction

- This is your opportunity to practice this task on your own.
  - **Academic**: Open the UCPath Help site and refer to the *Initiate Job Earnings Distribution PayPath Transaction (Acad)* topic.
  - **Staff**: Open the UCPath Help site and refer to the *Initiate Job Earnings Distribution PayPath Transaction (Staff)* topic.

- Launch the **Try It** version of the topic.
- Ask your instructor for assistance.
Instructor Demo

Initiate Return to Normal Distribution PayPath Transaction

- Watch as your instructor demonstrates how to initiate a return to normal distribution PayPath transaction in UCPath.

- Follow along using the UPK topic.
  - Open the UCPath Help site and refer to the *Initiate Return to Normal Distribution PayPath Transaction (Staff/Acad)* topic.

- Launch the **Print It** version of the topic.

- At the end of the demonstration, you will have the opportunity to practice this task.
Exercise

Initiate Return to Normal Distribution PayPath Transaction

- This is your opportunity to practice this task on your own.
  - Open the UCPath Help site and refer to the *Initiate Return to Normal Distribution PayPath Transaction (Staff/Acad)* topic.

- Launch the **Try It** version of the topic.

- Ask your instructor for assistance.
The UCPath Short Work Break (SWB) process refers to placing an employee on, or returning them from, a short work break.

- The action of SWB can be used to stop pay for an employee in the system for a temporary period of time and moves them to a ‘work break’ status.
- This process applies to both staff and academic employees.
- Employee’s on SWB are monitored at locations on a regular basis. The UCPath Center is responsible for monitoring the Short Work Break Audit Report and works with Locations to confirm the appropriate course of action regarding the employee on SWB.
Initiate Short Work Break PayPath Transaction

- Watch as your instructor demonstrates how to initiate a short work break PayPath transaction in UCPath.
- Follow along using the UPK topic.
  - Open the UCPath Help site and refer to the *Initiate Short Work Break PayPath Transaction (Staff/Acad)* topic.
- Launch the **Print It** version of the topic.
- At the end of the demonstration, you will have the opportunity to practice this task.
Exercise

Initiate Short Work Break PayPath Transaction

- This is your opportunity to practice this task on your own.
  - Open the UCPath Help site and refer to the *Initiate Short Work Break PayPath Transaction (Staff/Acad)* topic.
- Launch the **Try It** version of the topic.
- Ask your instructor for assistance.
Initiate Return from Short Work Break PayPath Transaction

- Watch as your instructor demonstrates how to initiate a return from short work break PayPath transaction in UCPath.

- Follow along using the UPK topic.
  - Open the UCPath Help site and refer to the *Initiate Return from Short Work Break PayPath Transaction (Staff/Acad)* topic.

- Launch the **Print It** version of the topic.

- At the end of the demonstration, you will have the opportunity to practice this task.
Exercise

Initiate Return from Short Work Break PayPath Transaction

- This is your opportunity to practice this task on your own.
  - Open the UCPath Help site and refer to the *Initiate Return from Short Work Break PayPath Transaction (Staff/Acad)* topic.

- Launch the **Try It** version of the topic.

- Ask your instructor for assistance.
Having completed this module, you should be able to:

- Describe the Job Data Change system process.
- Initiate a multi-row job data change PayPath transaction.
- Initiate a pay rate change PayPath transaction.
- Initiate a job earnings distribution PayPath transactions.
- Initiate a short work break PayPath transactions.
Module Review

Introduction

- You now have the opportunity to assess your knowledge of the information presented in this module.
- The questions and answers presented in this review help you to determine whether you remember and understand the important points.
Check Your Understanding
Course Review
Course Agenda

1: PayPath Transactions Overview
2: Position Changes
3: Job Data Changes
Putting It All Together

- As the Location PayPath Initiator, you initiate position, job data and additional pay change transactions, which are workflowed to Location PayPath Approver(s) for approval.

- **PayPath Actions** allows historic, current or future updates in **Position Data** and **Job Data**.

- **Job Data** changes can be made independent of a position change. However, if a position change is made, PayPath automatically updates the **Job Data** page to display the new position information.

- Refer to the *PayPath Transactions – Action Codes, Reason Codes and Descriptions* job aid for a description of all **Action** and **Action Reason** code combinations.
Course Objectives Review

Having completed this course, you should be able to:

- Describe the PayPath Transaction system process.
- Describe the PayPath Actions entry pages.
- Describe the PayPath transaction action and reason codes.
- Initiate position change PayPath transactions.
- Initiate job data change PayPath transactions.
Parking Lot

- Review parking lot
  - Have all questions been answered during our class?
  - Are there any new questions to add to the list?
Where to Get Help

- The **UCPath Help** site is your first level of support. Search for conceptual content, job aids or step-by-step instructions for UCPath tasks.
  - From the UCPath portal homepage, expand the **Help / FAQ** section on the left side of the page and then click the appropriate link to open the site. An Adobe PDF version is available for users with screen readers.
  - From any UCPath page or component, click the **Help** link in the upper right corner of the page to find help topics specific to the page/component.
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Kahoot!

Start

Enter

Game PIN

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